

## MONTANA STATE PLAN & POLICY MANUAL

### DEFINITIONS

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#### Definitions

**Adjunctive Eligibility** – Adjunctive eligibility is defined as automatic income eligibility for applicants/participants who report they are enrolled in a qualifying State or Federal program in Montana. These programs include: Supplemental Nutrition Assistance Program (SNAP – formerly Food Stamps), Temporary Assistance for Needy Families (TANF), Healthy Montana Kids Plus and Medicaid, Food Distribution Program on Indian Reservations (FDPIR), School Lunch Program (free and reduced price meals)

**American Indian or Alaska Native** – A person having origins in any of the original peoples of North, South, or Central America and who maintains tribal affiliation or community attachments

**Applicant** – a pregnant, breastfeeding or postpartum woman; infant; or child who is applying to receive WIC Program benefits

**Asian** – A person having origins in any of the original peoples of the Far East, Southeastern Asian or Cambodia, China, India, Japan, Korea, Malaysia, Pakistan, the Philippine Islands, Thailand and Vietnam

**Assessment** – The process of determining a person's nutritional eligibility for WIC based on information obtained from anthropometric measurements, biochemical laboratory tests, dietary and health history

**Benefit** – A cash value voucher, food instrument, fruit and vegetable benefit, electronic benefits transfer card (EBT), coupon or other document which is used by a participant to obtain supplemental foods

**Black or African American** – A person having origins in any of the black racial groups of Africa

**Breastfeeding** – A cost category used for creating a budget with all costs expended for promotion and support of breastfeeding. Examples include: salary/benefits of WIC staff that plan or conduct educational and other services to promote or support breastfeeding and/or to encourage the continuation of breastfeeding. Also included is the cost to develop/procure, print and distribute educational materials related to breastfeeding promotion and support, clinic space devoted to breastfeeding educational and training activities including a separate space set aside for nursing.

**Breastfeeding Coordinator** – The staff person designated responsible for the coordination of breastfeeding activities

**Breastfeeding Woman** – A woman, up to one year postpartum, who is breastfeeding or expressing milk at least once a day

**Caseload** – The number of persons certified eligible and receiving WIC benefits at a given point in time

**Categorical Eligibility** – An applicant who meets the definition of pregnant woman, breastfeeding woman, postpartum woman, infant or child

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**Certification Expiration Date** – The last day of the certification period and the last day the participant may receive food instruments

**Children** – Persons who have had their first birthday, through their fifth birthday

**Client** – Any WIC Program participant

**Client Information** – Information provided by an applicant or participant and that based on direct observation

**Client/Participant Services** – A cost category used for creating a budget with all costs expended to deliver food and other participant services and benefits. Examples include: WIC staff salaries/benefits to conduct diet and health assessments required in the certification process, to issue food instruments and explain their use, to participate in activities which promote a broader range of health and social services for participants and to conduct and participate in surveys/studies which evaluate the impact of WIC on its participants. Also included is the cost of medical supplies and equipment necessary to conduct diet and health screenings required in the certification process.

**Clinic** – The point of service, or site where WIC participants receive services. The facility must meet the following criteria:

- Provide sanitary facilities with hot and cold running water available
- Accessible under the requirements of the Americans with Disabilities Act and the State Plan
- Physical environment is safe and sanitary
- Appropriate and approved anthropometry equipment is available
- Equipment and/or furniture as needed to appropriately administer the full range of WIC services

**Code of Federal Regulations (CFR)** – United States Code that is a consolidation and codification by subject matter of the general and permanent laws of the United States prepared and published by the Office of the Law Revision Counsel

**Competent Professional Authority (CPA)** – An individual on the WIC staff authorized to determine nutritional eligibility for participation, develop a participant's nutrition care plan and prescribe supplemental foods

**Compliance Buy** – A covert purchase made with WIC Benefits by WIC staff or designated representatives

**Confidential Applicant and Participant Information** – Any information about an applicant/participant whether obtained from the applicant/participant, another source. Any information about an applicant/participant generated as a result of WIC application, certification, or participation; that individually identifies an applicant/participant and/or

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family member(s). Applicant/participant information is confidential, regardless of the original source and exclusive of previously applicable confidentiality provided in accordance with other Federal, State or local law.

**Contract Infant Formula** – All infant formulas (except exempt formulas) produced by the manufacturer awarded the infant formula cost containment contract.

**Cost Category** – A means of identifying costs associated with delivering services

**Current Income** – Income received by the household during the month prior to application or the previous year's income, which ever is the best indication of current household financial status

**DPHHS** – Department of Public Health and Human Services – USDA's administrative designee for WIC in the state of Montana

**Discrimination** – Any distinction of one person or a group of people from others; intentionally, by neglect, or by the effect of actions or lack of actions based on race, color, national origin, age, sex, or disability

**Dual Participation** – Simultaneous participation in the WIC program at more than one WIC clinic or in more than one state

**Economic Unit** – All persons, related and/or unrelated, living together in the same dwelling, with the exception of foster children and individuals who qualify as a separate economic unit.

**Emancipated Minor** – A person under the age of 18 who is living without supervision, control and/or economic support from other persons. If a minor receives any support for which he/she does not pay (such as shelter or meals) she/he is not to be considered a separate economic unit. If a minor pays all expenses for her/his own support, it is possible the minor may be considered a separate household. It is entirely possible for two separate economic units to reside under the same roof, although the determination of such is usually not clear cut.

**Employee** – A person whose salary is paid in whole or in party by funds provided by the WIC Program

**Employee Fraud and Abuse** – The intentional violation of program regulations, policies or procedures, including, but not limited to: misappropriating or altering FIs, entering false or misleading information in case record or creating case records for fictitious participants by a State, local agency or clinic employee.

**Encumbrance** – A designated amount of money set aside for a specific purpose

**Entrapment** – Influencing or coercing on the part of an agent of another person to commit an illegal act that would not have normally occurred in the absence of such influence or coercion

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**Exempt Infant Formula** – Infant formula which meets the requirements for an exempt infant formula under Sections 412(h) of the Federal Food, Drug and Cosmetic Act (21 USC 350a (h)) and the regulation at 21 CFR parts 106 and 107. These formulas are intended for use by an infant with special medical or dietary needs.

**Fair Hearing** – A procedure through which an individual may appeal a State or local decision which results in the denial of Program participation, suspension or termination from the WIC Program

**Family** – A group of related or non-related individuals who live together as one economic unit and whose production of income and consumption of goods and services are shared. Residents of a homeless facility or an institution will not be considered as members of a single family. Students who are temporarily away at school should be counted as members of the family.

**Farmer** – An individual authorized by the State WIC Office to sell eligible fruits and vegetables to participants at farmers' market or roadside stands. Individuals, who exclusively sell produce grown by someone else, such as wholesale distributors, cannot be authorized.

**Feeding Relationship** – The philosophy of nutrition and feeding developed by Ellyn Satter which is incorporated into nutrition education of Montana WIC

**Fiscal Year** – The period of 12 calendar months beginning October 1 of any calendar year and ending September 30 of the following calendar year. This is the period on which WIC funding is received from the USDA and upon which local agency contracts are based.

**Food Packages** – Groupings of supplemental foods prescribed to participants monthly

**Foster Parents** – Individuals assigned temporary custody of a participant by a recognized state or tribal authority

**Fruit and Vegetable Benefit (FVB)** – A fixed-dollar amount check, voucher, electronic benefit transfer (EBT) card or other document which is used by a participant to obtain authorized fruits and vegetables

**Full Nutritional Benefit** – Nutrients provided by the maximum allowable amount of a food category based on category, breastfeeding status and age

**Fully Breastfeeding** – 1) Breastfeeding or expressing breast milk while the infant receives no formula from WIC; 2) Infant receives breast milk (provided by the woman), receives no formula from WIC and may be receiving age appropriate supplementary foods such as cereal, vegetables, fruits and meats

**General Administration** – An administrative cost category used for creating a budget with all costs (direct or indirect) generally considered to be overhead or management costs. General management costs include costs associated with program monitoring, prevention of fraud, general oversight and food instrument accountability. Examples include: WIC administrative salaries/benefits and other costs necessary to conduct

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outreach, food instrument reconciliation, monitoring and payment, retailer monitoring, administrative record keeping and to prepare and maintain fiscal and program management reports. Other examples include: general management clerical support, the cost of payroll and personnel systems, accounting and bookkeeping, audits and other financial services and legal services.

**Hispanic or Latino** – A person of Cuban, Mexican, Puerto Rican, South or Central American or other Spanish culture or origin regardless of race can be used under the title of “Hispanic or Latino”

**Homeless Facility** – Any of the following facilities which may provide meal service:

- A publicly supervised or privately operated shelter (including a welfare hotel or congregate shelter or a shelter for victims of domestic violence)
- A temporary residence facility which provides for individuals intended to be institutionalized
- A public or private place not designed for or ordinarily used as a regular sleeping accommodation for human beings

**Homeless Individual** – A man, woman, infant or child lacking a fixed and regular nighttime residence, staying in a temporary shelter, temporarily living with others in their residence (not to exceed 365 days) or staying in a place not designated as a regular sleeping accommodation

**Income** – The gross cash income before deductions for income taxes, employees’ social security taxes, insurance premiums, bonds, etc.

**Ineligible** – An individual who does not qualify for WIC at either an initial or a subsequent certification because there is no documented condition of nutritional need, the person’s household income exceeds standards, the person does not live in the local agency’s service area, the child is five years or older, or the woman does not meet maternal requirements.

**Infant** – A person under one year of age (up to the date of their first birthday)

**Infant Formula** – Food which meets the definition of an infant formula in section 201(z) of the Federal Food, Drug and Cosmetic Act (21 USC 321(z)) and that meets the requirements for an infant formula under Section 412 of the Federal Food, Drug and Cosmetic Act (21 USC 350a) and the regulation at 21 CFR parts 106 and 107)

**Initial Contact** – The first time a person contacts a WIC clinic to request program benefits, whether inquiring in person or by telephone

**Licensed Nutritionist/Registered Dietitian** – A Registered Dietitian licensed to practice according to the Dietetics Nutrition Practice Act of the State of Montana and according to the policies and procedures of the Board of Medical Examiners

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**Local WIC Program** – The organizational body which provides WIC benefits within a defined service area

**Medical Foods** – Nutritional products included in a medical treatment protocol, that serve as a therapeutic agent for life and health maintenance and/or are required to treat an identified medical condition

**Migrant Farmworker** – An individual or member of a family whose principal employment is in agriculture on a seasonal basis, who has been so employed within the last 24 months, and who establishes for such employment, a temporary residence

**Native Hawaiian or other Pacific Islander** – A person having origins in any of the original peoples of Hawaii, Guam, Samoa, or other Pacific Islands

**Non-Contract Infant Formula** – All infant formulas not covered by the infant formula cost containment contract with the Montana WIC Program

**Nutrition Education** – Individual and/or group sessions which provide information and educational materials designed to improve health status and achieve positive changes in dietary and physical activity habits and emphasize relationships between nutrition, physical activity and health, all in keeping with the individual's personal and cultural preferences. Nutrition education is an administrative cost category used for creating a budget with all costs directly related to general nutrition education. Examples include: salaries/benefits, travel and training costs for WIC staff who plan or conduct nutrition education, costs to develop/procure, print and distribute nutrition education materials, cost of equipment required to conduct nutrition education training, interpreter and translator services to facilitate training and costs associated with evaluating and monitoring nutrition education.

**Nutritionist** – A person who has satisfactorily completed a baccalaureate, master's or doctoral degree in the field of dietetics, food and nutrition or public health nutrition conferred by an accredited college or university. "Nutritionist" is a protected title in Montana.

**Object Class Budget Items** – Line items such as salaries, fringe benefits, postage, etc.

**Out-Lying Clinic** – A facility apart from the place identified by the contractee as the main clinic site to provide WIC services, located within the same county or reservation and not within a five mile radius of the main clinic. (satellite clinic)

**Outreach** – Informing potentially eligible persons of the benefits and availability of the WIC Program.

**Parent/Legal Guardian** – An individual who, through blood or adoption, has legal custody or another person

**Partially Breastfeeding** – Breastfeeding or expressing breast milk at least once per day and receiving about half or more of the maximum formula allowance from WIC

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**Participants** – Pregnant, breastfeeding, and/or postpartum women, infants and children who are certified to receive WIC benefits

**Participant Violation** – Any intentional action of a participant, parent or caretaker of an infant or child participant, or proxy that violates Federal or State statutes, regulation, policies, or procedures governing the Program

**Participation** – The number of eligible infants, children, pregnant women, breastfeeding women and non-breastfeeding women receiving food benefits during the month. A breastfeeding infant who receives no formula from WIC, but whose breastfeeding mother receives food benefits is included in this count; as well as a partially breastfeeding woman who is six months or more post-partum and does not receive a food benefit, but with an infant whom receives approximately half of the full formula food package.

**Postpartum Women** – Women up to six months after termination of pregnancy, including live birth, stillbirth, abortion and miscarriage

**Poverty Income Guidelines** – The poverty income guidelines prescribed by the Federal U.S. Department of Health and Human Services (USDHHS) adjusted annually and effective on or before July 1, of each year.

**Pregnant Women** – Women determined to currently have one or more embryos or fetuses in utero

**Priority System** – Criteria based system applied to persons on waiting lists to ensure those at highest nutrition risk are chosen first to fill vacancies

**Proxy** – An individual, designated by the participant/parent/guardian, with the authority to attend nutrition education appointments and to pick up benefits

**Rebate** – The amount remitted to the State WIC Program by the formula manufacturer for the number of cans of contract infant formula redeemed on food instruments during the contract period

**Recipient** – An individual or parent/guardian/caretaker of an individual who is certified to participate in the WIC Program and to receive WIC services and benefits

**Registered Dietitian** – A person who has passed a registration examination and is registered by the Commission on Dietetic Registration. In a WIC Program a registered dietitian is responsible for providing nutrition assessment and education to high-risk participants who are determined at certification or follow-up visits to require more in-depth nutrition intervention.

**Residency** – Location or address where applicant/participant routinely lives or spends the night

**Retail Purchase System** – A system in which the participant obtains WIC foods through an authorized food retailer; i.e. grocer or pharmacy

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**Retailer** – An entity that, through a signed agreement with the State WIC Program, provides WIC foods in exchange for WIC benefits. Each individual retailer must be contracted separately.

**Satellite Clinic** – A facility apart from the place identified by the contractee as the main clinic site to provide WIC services, specifically another county or outside reservation boundaries. (out-lying clinic) A satellite clinic requires a sub-contract be executed between the governing bodies of the main and satellite clinics.

**SNAP** – Supplemental Nutrition Assistance Program formerly known as the Food Stamp Program

**Staffing Ratio** – The ratio of WIC staff to number of participants served

**Standard Food Package** – A standard set of food specific to a category of WIC participants

**State Plan** – The plan of WIC Program operation and administration which describes the manner in which the State WIC Office intends to implement and operate all aspects of Program administration within its jurisdiction in accordance with USDA regulations

**State WIC Office** – The Montana Department of Public Health and Human Services (DPHHS) in its role as USDA's administrative designee for the WIC Program

**Substantially Breastfeeding** – Breastfeeding or expressing breast milk at least once per day and receiving less than half of the maximum formula allowance from WIC

**Supplemental Foods** – Foods containing nutrients determined by nutritional research to be lacking in the diets of pregnant, breastfeeding and postpartum women, infants and children and foods which promote the health of the population served by the WIC Program as indicated by relevant nutrition science, public health concerns, and cultural eating patterns

**TANF** – Temporary Assistance to Needy Families, a program which provides temporary financial assistance to families with children who are deprived of support because of the absence or disability of one or both parents

**USDA** – United States Department of Agriculture, the federal agency which funds the WIC Program

**User Procedure Manual** – A manual with instructions and procedures to operate the WIC automated systems

**VENA** – Value Enhanced Nutrition Assessment; collection and clarification of participant information in an interactive manner to identify and document the participant's risks and needs and formulate an intervention plan with the participant

**VOC Card** – Verification of Certification Card attesting to the eligibility of a participant. These are issued to participants who are transferring from one state to another state.



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**Waiting List** – A list of applicants waiting to be accepted in the WIC Program when vacancies occur. A waiting list would be established with prior approval from the State WIC Office if maximum caseload is reached.

**White** – A person having origins in any of the original peoples of Europe, Middle East, or North Africa

**WIC** – A federally funded program established under the Child Nutrition Act of 1966, amended, to provide nutrition education, referrals to health care and other resources and supplemental foods for low-income pregnant, postpartum and breastfeeding women, infants and children up to five years of age

**WIC Director** – An individual responsible for overseeing the administrative aspects of the WIC Program. Typical responsibilities include: fiscal management, program planning, staff supervision and serving as a contract liaison.

**WIC ID Packet** – A packet used to document participation in WIC. The ID packet provides a place for the participant/guardian's signature, proxy signature and safekeeping of benefits until they are redeemed and contains an appointment schedule, benefit cashing procedures and information on the participant's responsibilities and WIC benefits.